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THE B. DALTON STORY, PART 2
THIRD QUARTER BOOK SALES SPOTTY
CHILDREN'S BOOK SCENE
INDEX TO FORECASTS

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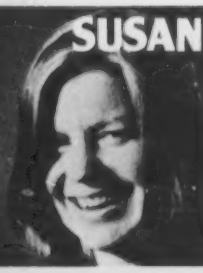
AMIS

BOOTH

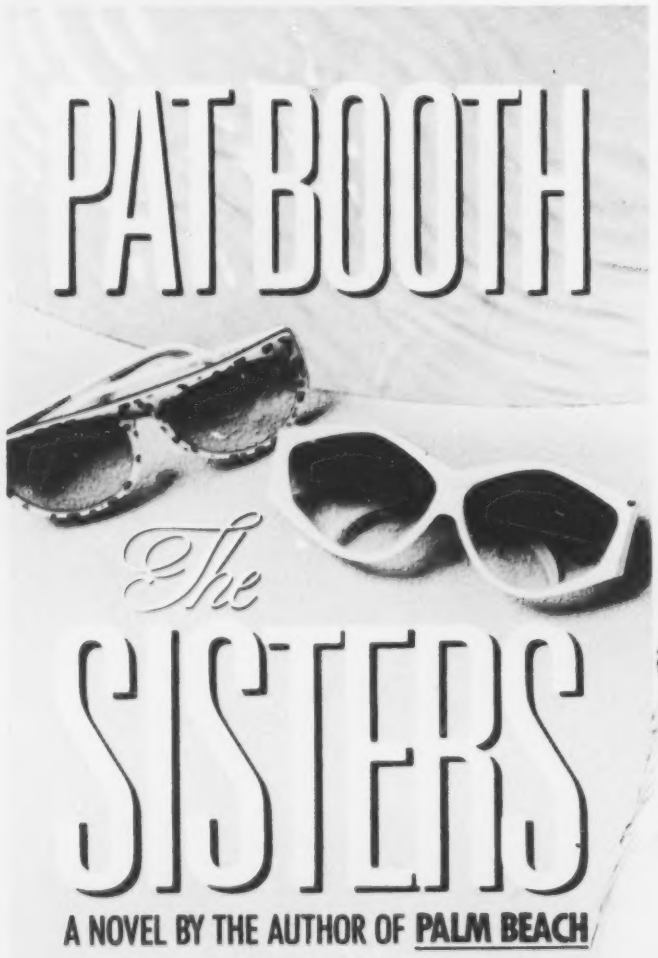


CHEEVER

CROWN PUBLISHERS Inc. HARMONY BOOKS Clarkson N. Potter, Inc.

The Crown Publishing Group introduces its outstanding new list

The Sisters
A Novel
by Pat Booth



A sizzling new novel by the author of the international bestseller *Palm Beach*, *The Sisters* is a stylish, sexy romp among the aristocrats, sex kittens, art hacks, brat packs, boy toys and toy boys of Los Angeles—where celebrity is all. It's the rapid, pulsating tale of a supersuccessful writer and her equally famous actress-sister—two women united by blood but divided by a passionate, obsessive hatred...and by a secret few sisters share. Glamorous and sensuous, *The Sisters* is a very contemporary drama created by an author who is herself a spectacularly beautiful superstar.

• 75,000-copy first printing and $75,000 national launch budget • National author tour • Slit cards and tent cards for instant displays • First serial to *Cosmopolitan* magazine, April issue.

April (564394) $17.95

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Arbor House Reduces List, Eliminates Several Jobs

In an effort to compete more effectively in the marketplace, Arbor House announced it will reduce title output from 70 in 1987 to 40 by 1989. The list reduction also results in the elimination of several editorial positions.

Editor-in-chief Ann Harris, senior editor James Raimes, managing editor Susan Friedland and three assistants will no longer be with the company effective January 1. Arbor House president Eden Collinsworth and executive editor Allan Mayer, who joined the company last year from *Newsweek*, will oversee the editorial process.

Collinsworth told *PW*, "This is not a reaction to poor performance. Our sales have increased by 35% this year. It was a decision I made, and I wanted to make it from a position of strength rather than three years later when a decision may be imposed upon us."

She denied rumors that Arbor House will become an imprint of Morrow. "That is not the case. If Hearst wanted to make us an imprint of Morrow, they would have done it long ago. We remain independent of Morrow and will continue to acquire, publish, promote, sell rights and distribute ourselves."

Collinsworth said Arbor House competes not only with major hard/soft publishers but also with Morrow within the Hearst Book Group. "There are two ways to compete, by volume or by keeping the list small and publishing it well. I decided that the best thing for Arbor House is to step back, reduce its list and do things in a different way. We're known as an idiosyncratic house, and we want to keep it that way. We're offering agents the unique arrangement of having hands-on management participation in the publication of each new book. I'm trying to carve out a niche for Arbor House, and this is a first step."

The list reduction will be implemented gradually, Collinsworth said. In 1987, 70 titles are scheduled for publication; in 1988, 51 titles and by 1989 the list will be down to 40 titles.

Arbor House is able to compete for blockbusters on an equal footing with Morrow, Collinsworth said, because it receives the same financial backing from Hearst. It recently signed a $3 million, two-book contract with Elmore Leonard.

The move to scale down operations coincides with Arbor House's impending move to the building now occupied by Morrow. Avon Books—the paperback subsidiary of the Hearst Book Group—will also move into Morrow's building early next year.

—M.Y.

Group to Study Religious Publishing

The first major study of the Christian publishing and distribution industry in the U.S. and Canada is being conducted by a team of researchers from the Center for Book Research at the University of Scranton. The study is sponsored by the Christian Booksellers Association, the Evangelical Publishers Association and the Protestant Church-Owned Publishers Association. It will report on the development of publishing, marketing and distribution of Christian books in the U.S. and Canada since World War II, examine the current condition of the industry and project market trends for the next century.

1985 Leaders in Growth and Performance

In its study of 26 book publishing companies, ranging in size from under $10 million to $664 million, the New York investment banking firm of Veronis, Suhler & Associates found that the publishers' 20.5% revenue growth for 1985 more than doubled that of 1984. Here are the star performers.

Growth Leaders

	Rank	Revenues		Pretax Operating Income		Pro Forma Operating Cash Flow	
1985 $ Mil Totals	1	G+W	$663.6	Time	$85.0	SFN Cos.	$99.9
	2	Time	552.0	G+W	79.5	Time	88.0
	3	McGraw-Hill	460.2	SFN Cos.	74.9	G+W	85.1
	4	HBJ	390.3	McGraw-Hill	67.5	McGraw-Hill	75.3
	5	SFN Cos.	389.0	Macmillan	58.9	Macmillan	75.3
1985 Growth (%)	1	G+W	132.3	Scholastic	3750.0	Price/Stern/Sloan	1050.0
	2	Price/Stern/Sloan	60.0	Harlequin	165.9	Scholastic	260.0
	3	Macmillan	26.8	G+W	151.6	G+W	154.8
	4	MCA	18.5	Western	78.4	Harlequin	106.4
	5	Bell & Howell	14.3	John Wiley	54.8	Western	80.7
5-Year Compound Annual Growth Rate %	1	G+W	43.2	MCA	72.0	G+W	57.0
	2	Price/Stern/Sloan	27.8	G+W	57.0	Price/Stern/Sloan	26.4
	3	MCA	21.9	Western	53.1	Macmillan	25.0
	4	Bell & Howell	15.8	Price/Stern/Sloan	28.4	Scholastic	21.8
	5	Thomas Nelson	15.7	Macmillan	28.2	Plenum	17.7

Performance Leaders

	Rank	1985 Return On Assets (%)		1985 Margins (%)		81 V. 85 Margin Change (Points)	
Pretax Operating Income	1	Waverly Press	30.5	Plenum	29.1	Western	10.1
	2	Time	29.9	SFN Cos.	19.3	MCA	9.5
	3	Western	29.4	Macmillan	15.9	Time	8.5
	4	Plenum	25.5	Time	15.4	Plenum	7.8
	5	MCA	25.5	McGraw-Hill	14.7	Macmillan	6.5
Pro Forma Operating Cash Flow	1	Waverly Press	31.1	Plenum	32.3	Plenum	8.4
	2	Time	30.9	SFN Cos.	25.7	Time	8.3
	3	Irwin	30.7	Macmilan	20.4	Macmillan	7.0
	4	Western	30.0	Irwin	20.0	Wm. Sadlier	6.3
	5	Plenum	28.4	Grolier	16.5	Grolier	4.6

Third Quarter Book Sales: Spotty

By John P. Dessauer

Textbook sales improved, but most consumer categories slowed down during the third quarter. Exceptions were mass market paperbacks, which showed fair unit gains after three quarterly declines. Since about half of annual elhi and college textbook sales are consummated in this quarter, the pace of total industry sales decreased only marginally. However, unless consumer sales recover the strength they exhibited in the second quarter, 1986 could prove to be a disappointing year for most publishers and booksellers.

Readers comparing the current estimates with those of the first two quarters (*PW*, June 27 and Sept. 5, 1986), should note that the present data incorporate my final revision of 1985 sales for *Book Industry Trends* (BISG), which utilizes the annual statistical reports released during the summer by AAP and ECPA. This revision, comparable to similar revisions in years past, results in some discontinuity with, particularly, the unit figures of the previous estimates. □

TABLE 1

ESTIMATED PUBLISHERS' NET BOOK SALES—THIRD QUARTER 1986

(Millions of Dollars and Units)

	July–Sept. 1986		July–Sept. 1985		Percent Change		Jan.–Sept. 1986		Jan.–Sept. 1985		Percent Change	
	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units
Trade	784.0	197.54	750.8	203.07	4.4	(2.7)	2,007.1	481.26	1790.8	466.14	12.1	3.2
Adult Hardbound	376.1	60.08	354.4	59.39	6.1	1.2	1,048.7	169.30	902.5	152.94	16.2	10.7
Adult Paperbound	239.3	62.30	235.6	68.92	1.6	(9.6)	557.3	148.72	545.8	164.21	2.1	(9.4)
Children's Hardbound	96.9	28.42	103.2	30.31	(6.1)	(6.3)	280.1	82.17	246.4	72.36	13.7	13.6
Children's Paperbound	71.6	46.75	57.6	44.46	24.4	5.2	121.0	81.07	96.1	76.63	25.9	5.8
Religious	171.0	35.28	163.1	37.00	4.8	(4.7)	488.5	102.95	460.3	107.6	6.1	(3.8)
Hardbound	120.3	15.27	114.6	16.33	4.9	(6.5)	344.2	44.92	323.5	47.55	6.4	(5.5)
Paperbound	50.7	20.01	48.5	20.67	4.6	(3.2)	144.4	58.03	136.9	59.51	5.5	(2.5)
Professional	794.6	55.08	749.4	52.49	6.0	4.9	1965.3	137.33	1773.6	124.67	10.8	10.2
Hardbound	531.41	18.97	504.3	18.64	5.4	1.7	1,308.2	47.05	1,193.6	44.46	9.6	5.8
Paperbound	263.2	36.11	245.1	33.84	7.4	6.7	657.1	90.28	580.0	80.21	13.3	12.5
Book Club	196.9	35.07	194.1	36.43	1.5	(3.7)	506.8	92.32	493.7	95.25	2.7	(3.1)
Hardbound	165.0	14.22	162.3	14.76	1.6	(3.7)	422.8	36.89	410.5	37.81	3.0	(2.4)
Paperbound	32.0	20.86	31.7	21.86	0.7	(3.8)	84.0	55.43	83.2	57.45	1.0	(3.5)
Mail Order Publications	152.3	31.37	146.5	29.33	4.0	7.0	446.2	91.20	434.0	86.25	2.8	5.7
Mass Market Paperbound	272.5	179.30	259.7	171.97	5.0	4.3	745.8	469.88	725.5	469.64	2.8	(0.1)
University Presses	36.7	3.84	33.7	3.77	8.9	1.9	81.4	8.66	75.7	8.69	7.6	(0.4)
Hardbound	25.4	1.42	23.6	1.43	7.7	(0.6)	56.6	3.21	52.8	3.24	7.2	(1.2)
Paperbound	11.2	2.43	10.1	2.35	11.8	3.4	24.8	5.45	22.9	5.44	8.4	0.1
Elhi Text	866.6	143.09	758.9	135.66	14.2	5.5	1,421.3	228.49	1,292.7	225.99	9.9	1.1
Hardbound	503.9	50.21	429.7	46.07	17.3	9.0	821.2	82.53	731.9	79.26	12.2	4.1
Paperbound	362.7	92.88	329.2	89.59	10.2	3.7	600.1	145.96	560.8	146.73	7.0	(0.5)
College Text	798.0	52.57	729.0	54.16	9.5	(2.9)	1,149.6	81.17	1,086.8	84.24	5.8	(3.6)
Hardbound	672.6	35.31	612.7	36.15	9.8	(2.3)	969.1	54.62	913.3	56.33	6.1	(3.0)
Paperbound	125.4	17.27	116.4	18.01	7.7	(4.1)	180.6	26.55	173.5	27.91	4.1	(4.9)
Subscription Ref.	56.9	0.15	57.9	0.16	(1.7)	(6.1)	154.8	0.40	156.7	0.42	(1.2)	(5.1)
Total	4,129.5	733.31	3,843.0	724.05	7.5	1.3	8,966.8	1,693.66	8,289.7	1,668.37	8.2	1.5

TABLE 2

ESTIMATED DOMESTIC CONSUMER EXPENDITURES ON BOOKS—THIRD QUARTER 1986

(Millions of Dollars and Units)

	July–Sept. 1986		July–Sept. 1985		Percent Change		Jan.–Sept. 1986		Jan.–Sept. 1985		Percent Change	
	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units	Dollars	Units
General Retailers	1,744.5	265.80	1,617.2	265.71	7.9	0.0	4,320.7	669.02	3,942.3	659.16	9.6	1.5
College Stores	1,256.2	112.93	1,124.4	108.84	11.7	3.8	2,407.0	219.85	2,288.0	225.46	5.2	(2.5)
Libraries & Institutions	323.0	23.12	301.9	22.81	7.0	1.4	984.3	71.38	908.1	69.55	8.4	2.6
Schools	809.6	115.07	699.0	107.92	15.8	6.6	1,468.5	211.25	1,331.4	208.47	10.3	1.3
Direct to Consumer	481.2	61.76	483.8	64.57	(0.5)	(4.3)	1,422.1	184.29	1,364.7	183.95	4.2	0.2
Other	69.5	29.33	66.0	29.88	5.3	(1.8)	251.3	107.99	228.0	105.22	10.2	2.6
Total	4,684.0	808.82	4,292.3	599.72	9.1	1.4	10,853.9	1,463.78	10,062.5	1,451.80	7.9	0.8